eMARS Workflow Session
December 2005

Introduction

- Welcome…and let the fun begin!
- Terminology
- Document Crosswalk (MARS to eMARS)
- "Staged" approach to gathering Approval Rules
- Agency Responsibilities
- eMARS Project Team Responsibilities
- Q & A Session

Terminology

- **Approval Rule**: Approval/Routing "sheet" assigned to each document in Workflow

  - Based on document code and most closely matched organizational code (Dept/Unit from document header)

 - Approval Restriction (Creator, Submitter or Creator/Submitter)

Terminology

- **Approval Rule**: Approval/Routing "sheet" assigned to each document in Workflow
  - Identify <u>approval levels</u> to be used
  - Assign <u>sequence number</u> to each level (parallel vs. sequential approval)
  - Identify <u>approval conditions</u> (if any)
  - Assign <u>Approval Role</u> to each approval level
  - <u>E-mail</u> (Should E-mail be sent to members of Approval Role)

Terminology

- Approval Condition: Evaluated during approval processing to determine if approval level is required
  - GAX document for department 750
    - No conditions for level 1 (approval level <u>always</u> invoked)
    - Condition for level 2 = Total $ Amount > $5,000 (GAX documents for dept 750, greater than $5,000 only, will require level 2 approval)
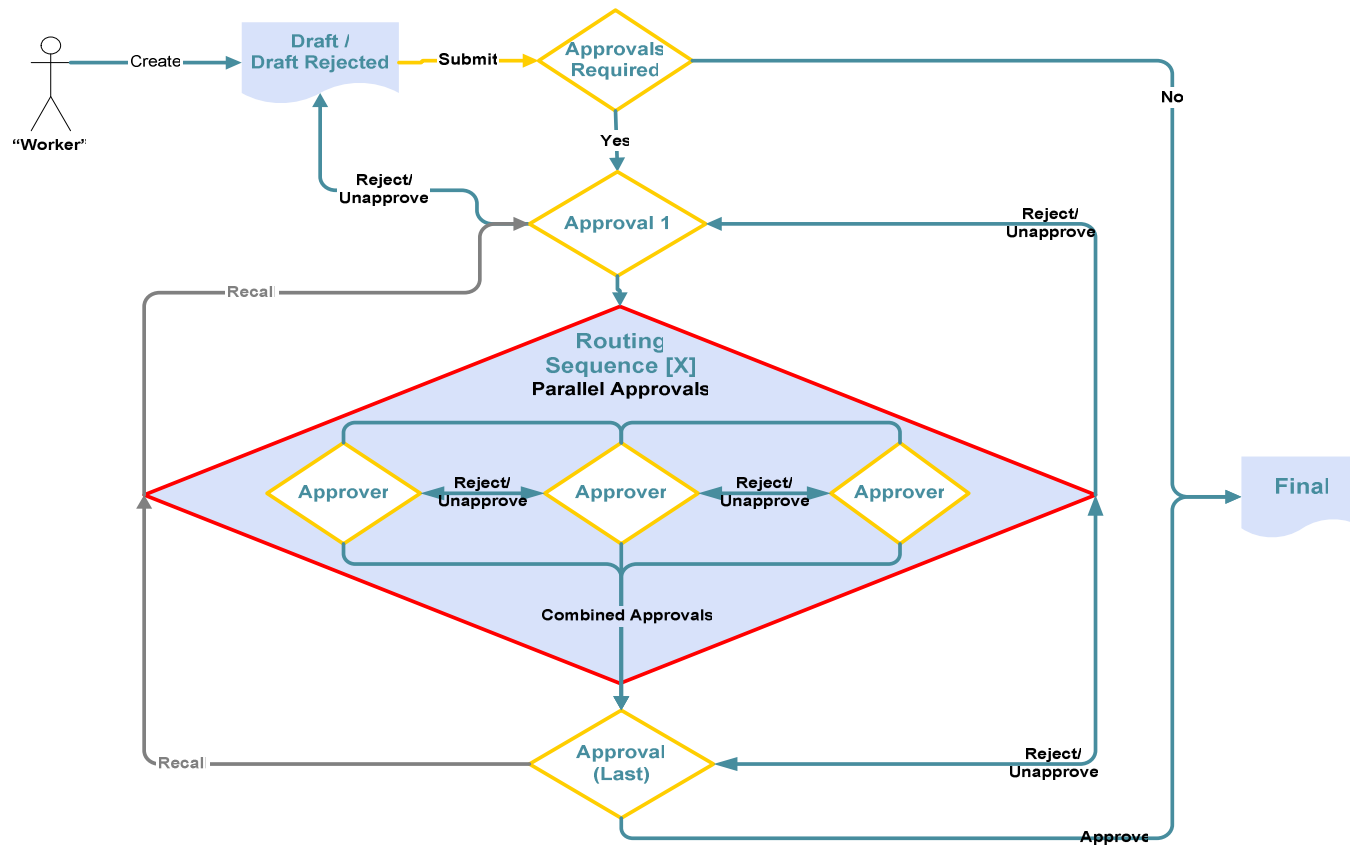
Sequential Approvals
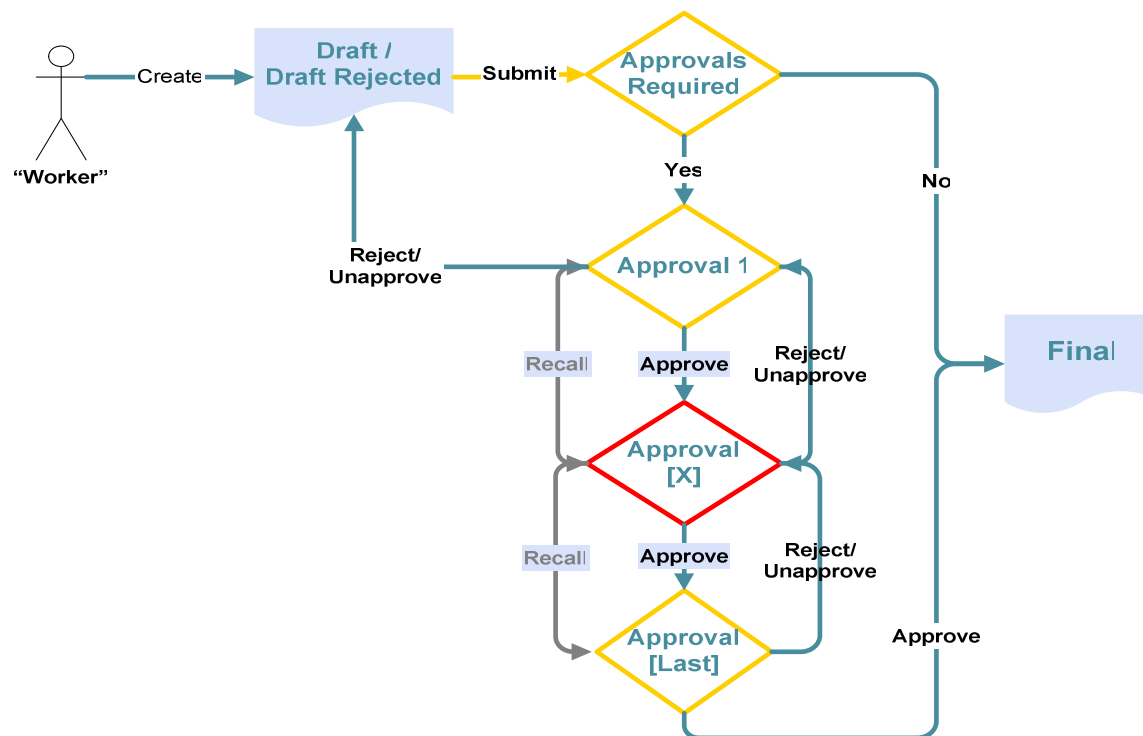
Terminology

Parallel Approvals

MARS to eMARS document crosswalk

- Assist in completing Workflow spreadsheet

- Workflow spreadsheet only contains documents where "agency" approvals will be applied

- Some documents will only be entered/approved by central agencies (i.e. GOPM, Finance – OMPS, etc…)

- eMARS Project Team will work with "central" agencies at a later time to identify their Approval Rules

Approval Rules – Staged Approach

- **Step 1**: Using document crosswalk identify documents your agency will use in eMARS

- **Step 2**: For each of these documents <u>one</u> Approval Rule will be defined for each <u>department</u>

- **Step 3**: Submit "default" Department rules to the eMARS Project Team by December 30, 2005

Approval Rules – Staged Approach

- **Step 4**: "Default" rules will be loaded in UAT

- **Step 5**: Through analysis and UAT testing identify gaps where additional Approval Rules and/or Approval Conditions are needed

- **Step 6**: Submit additions/changes to Approval Rules and/or Approval Conditions to the eMARS Project Team

Approval Rules – Staged Approach

- **Step 7**: eMARS Project Team will load in UAT

- **Step 8**: UAT testing to verify the correct Approval Rules are being assigned to your documents

- **Step 9**: Repeat steps 6 – 8 until Approval Rules are correctly defined

- **Step 10**: "Certify" Approval Rules

Approval Rules – Staged Approach

- Why must we assign a "default" Approval Rule for each document?

  - Excellent starting point (i.e. "80/20" Rule)

  - Ensures an Approval Rule at a department level is always invoked

  - Lessons Learned

    - Other Advantage 3 implementations
    - MARS (PD) implementation

Approval Rules – Staged Approach

- Why must we assign a "default" Approval Rule for each document?
  - Lack of knowledge/expertise in the application ("Cart before the horse" scenario)
    - Organizational Codes
    - Document Codes
    - System Usage Analysis
    - Timing concerns related to UAT testing

Approval Rules – Staged Approach

- everyone

- Make

- Approval

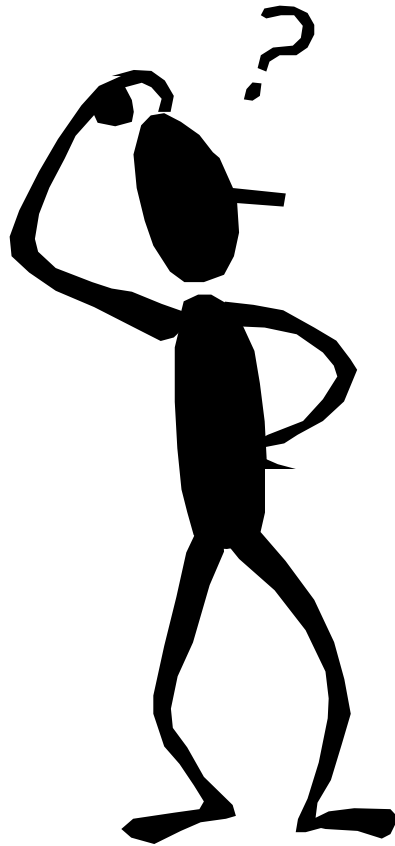- Rules

- Simple

Agency Responsibilities

- Complete workflow spreadsheet and return by December 30, 2005

- UAT Environment – Test and validate "default" Approval Rules

- Update Approval Rules (if necessary)

- Certify Approval Rules

eMARS Project Team Responsibilities

- Identify "central" approval levels for all documents

- UAT Environment – Test and validate central approval levels

- Work with "central" agencies to establish their Approval Rules

Questions?